



# transformational development indicators field guide

## volume five interdependent and empowered communities

*a guide to the indicators on community participation  
and social sustainability*

World Vision  
Development Resources Team



## transformational development indicators

The purpose of Transformational Development Indicators (TDI) is to show the status of the quality of life of communities, families, and children where World Vision is facilitating community based, sustainable, transformational development programmes. The process and results of measuring these indicators are designed to be valuable to communities, development programmes, World Vision national offices (field and funding), the wider World Vision Partnership, and key external stakeholders. The indicators reflect World Vision's understanding and ethos of development, as expressed in the Transformational Development policy and framework. The measurement of TDI in all WV community development programmes on a regular basis is one contribution toward creating an organisational culture of quality and accountability.

The Ministry Standards Working Group (MSWG) was formed in 1997 in response to a mandate by the World Vision International President to "propose a standard set of quality of ministry indicators which will be used throughout the Partnership". The MSWG consulted with the wider Partnership over a period of two years to develop a framework of twelve indicators to be used in all Area Development Programmes (ADPs). Technical modules were developed for each of the twelve transformational development indicators (TDI) and tested for validity and usefulness in selected ADPs around the world.

The Ministry Standards Testing Centre (MSTC) was formed in 2000 to build upon the work of the MSWG. A World Vision Partnership-wide reference group, the Ministry Standards Advisory Network (MSAN), supported the work of the MSTC and provided input and useful feedback. The TDI went through two further rounds of field-testing in selected ADPs in all the regions. Based on the learning from the tests, the TDI were finalised. The MSTC concluded its work in September 2002.

A Development Resources Team (DeRT) was formed in July 2002, as a unit within the Ministry group of WV to coordinate the Partnership-wide implementation of the TDI and carry out other functions related to programme quality.

The following TDI Publications are or will be available as noted below:

- a. *Transformational Development Indicator (TDI) Field Guide* – contains procedures, protocols, and tools required to plan for measurement of the TDI, including analysis and reporting of TDI results. Development programme staff will need to follow all the instructions given in the TDI Field Guide for every aspect of planning, implementation, and follow-up of TDI measurement. Available in preliminary form December 2002. The published form is scheduled to be available by June 2003.
- b. *Training resources* - include guides for Regional and National Office training programmes on competencies required for implementation of TDI in development programmes and National Offices. Scheduled to be available January/February 2003.
- c. *Supplementary Programme Resource Guide* – in easy access format makes available information on principles and practices in topics related to the TDI. This is a "resource" which includes options for development programme staff with respect to programme context. It is not a set of guidelines requiring implementation. Scheduled to be available September 2003.

The publication of this field guide was made possible through support provided by World Vision offices in Australia, Canada, Germany, Japan, New Zealand, Switzerland, Taiwan, United Kingdom, and United States.

Published December 2002.

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**Copies of TDI publications can be obtained** from the Development Resources Team, World Vision, 220 I Street NE, Suite 270, Washington D.C. 20002-4373. Tel: 202-547-3743. Fax: 202-547-4834. E-mail: [development\\_resource\\_team@wvi.org](mailto:development_resource_team@wvi.org)

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## **Acknowledgements**

First and foremost, thanks go to the Area Development Programmes that participated in the three sets of field tests for transformational development indicators (TDI). They were essential to developing these indicators and contextualising them to be meaningful for the communities with which World Vision works, other organisations, and the entire World Vision Partnership. It is to them that this Field Guide is dedicated.

This volume was written by Justin Byworth, Coordinator, Development Programming, with technical input and comment from Jaisankar Sarma and Bernard Vicary of the Development Resources Team of the World Vision Partnership Offices, Ari Uotila, Program Quality Specialist from World Vision Canada, and Joann Sleat, editor. Some material was taken and adapted from earlier versions of the chapters in this volume, which were written by Jaisankar Sarma and Ari Uotila, as well as from a range of references listed in the bibliography.

The guidance provided first through the Ministry Standards Working Group and then through the Ministry Standards Advisory Network was essential in bringing the TDI initiative to fruition. A special thanks goes to Frank Cookingham, World Vision Director of Evaluation, for his vision and leadership throughout the years of this project. Also to Tim O'Shaughnessy, World Vision Australia, for his work in the early stages of this initiative.

The Ministry Standards Testing Centre (MSTC) was established as a Partnership initiative in June 2000 to test and operationalise TDI. WV Germany supplied the initial funding needed for the work of the MSTC in FY00 and FY01. WV Canada and WV US provided the MSTC with staff time, technical input, and management support.

### **This series**

This series of eight volumes for the *Transformational Development Indicators (TDI) Field Guide* has been developed by the Development Resources Team of World Vision (DeRT), and its predecessors the Ministry Standards Working Group, Ministry Standards Advisory Network, and the Ministry Standards Testing Centre. The field guide provides the technical basis for the measurement of the transformational development indicators, including the methods for collecting, analysing, and reporting on the indicators. A table of the transformational development indicators is included in each volume. The field guide and all associated software are also available on CD-ROM.

*The Transformational Development Indicators (TDI) Field Guide* is available in the following volumes:

- *Volume 1. Getting Started (Introduction to TDI, A Guide to Planning, Implementation, and Translation).*
- *Volume 2. Well Being of Children and Families – Part I (A Guide to the Indicators on Nutrition, Immunisation, and Education).*
- *Volume 3. Well Being of Children and Families – Part II (A Guide to the Indicators on Water, Diarrhoea Management, Household Resilience, and Poorest Households).*
- *Volume 4. Transformed Relationships (A Guide to the Indicators on Caring for Others, Emergence of Hope, and Christian Impact).*
- *Volume 5. Interdependent and Empowered Communities (A Guide to the Indicators on Community Participation and Social Sustainability).*
- *Volume 6. Methods – Focus Group Guidelines.*
- *Volume 7. Methods – Survey Guidelines.*
- *Volume 8. Analysis and Reporting.*

The following conventions are used throughout this series, including this volume:

Step #	Do something
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A black and orange box (black and grey box on black and white printers or in photocopies) notes a step in the logical process of completing a specific task.

The footsteps lead to an example of a point which has just been explained in the text.

## Chapter 1. Community Participation

### Introduction

Community participation in development is vital. It is a prerequisite for community “ownership” of their own development - one of the principles in World Vision’s policy on transformational development (TD). This indicator comes within the fourth domain of change in World Vision’s TD framework and policy, “interdependent and empowered communities”.

The concept of participation is understood to be a continuum. On the “low end” of the continuum, development initiatives in communities are being conducted by external agencies with little community input or participation. On the other, or “high end”, of this continuum, communities control all or most aspects of their development, using outside agencies as partners when needed and as it suits their purposes.

It is recognised that community participation in development goes far beyond a single intervention, such as a World Vision development programme. However, for the sake of cost-effectiveness and practicality, *participation* as measured by this indicator is primarily that relating to development programmes and initiatives in a WV programme area. It should be noted that this does extend to other development programmes, interventions, or local community development initiatives which may exist in the same area, whether World Vision is involved or not.

### TD Indicator

*The transformational development indicator for community participation is:*

**Communities’ participation in development.**

*Communities’ participation* means that men, women, boys, and girls perceive they actively participate in all aspects of their development, with particular focus on programme planning, implementation, monitoring, and evaluation.

### Measurement & Analysis

Primary data is obtained from guided focus group discussions. Information is analysed and indexed by a rating committee using specific rating guidelines.

The indicator is measured through eight focus group discussions with men, women, girls, and boys in two selected communities in the programme area. (Youth are aged 12-16.) Various aspects of community participation in programme planning, implementation, monitoring, and evaluation are discussed by focus group participants (80-100 persons in total). Information from these is analysed by a rating committee that identifies key points, examples, and quotes, and assigns scores for each of the eight topics discussed. The rich qualitative discussion notes are retained for use and learning by the community, development programme, and World Vision National Office. For the purposes of global TDI monitoring, scores, selected key points, and quotes from focus groups are reported.

The procedures for measuring the *community participation* indicator are described in detail in Volume 6 of this field guide, *Focus Group Guidelines*, which also provides advice and examples relating to all 18 steps involved. This chapter includes a summary of these steps, the instruments

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(discussion guide, scorecard, log sheet, analysis worksheets, reporting formats) and additional guidance specific to this indicator.

### Summary of Measurement Procedure Community Participation

#### Planning and Preparation

Step 1	Selection of focus group data collectors
Step 2	Translation of relevant TDI documents
Step 3	TDI orientation for focus group data collectors
Step 4	Focus group training and practice
Step 5	Selection of communities for focus groups
Step 6	Selection of focus group participants in each community

#### The Focus Group

Step 7	Introduce the focus group – it's purpose and the people involved
Step 8	Facilitate discussion of the indicator by focus group participants, using the discussion guide
Step 9	Review the process

#### Analysis and Scoring

Step 10	Discuss focus group contents/data for topic 1, with analysis worksheet as a guide
Step 11	Assign score for topic 1, with scorecard and analysis worksheet as guides
Step 12	Discuss focus group contents/data and assign scores for topics 2-8 with analysis worksheets as guides
Step 13	Complete focus group records
Step 14	Archive focus group notes/recordings

#### Reporting

Step 15	Gather completed log sheets & analysis worksheets from all FGs for the indicator
Step 16	Hold meeting of data collection teams for information sharing and consolidation
Step 17	Selection of key points and quotes from focus groups for the indicator
Step 18	Complete report Tables R1, R2, R3, and R4 and submit report for the indicator



### Additional Guidance for Measuring the Community Participation Indicator

#### At Step 1: Selection of Focus Group Data Collectors

It is important for this indicator that the focus group facilitators are familiar with the development programmes and activities taking place in communities selected for focus groups. Therefore, in this case, facilitators should either be local programme staff or well-oriented to the communities.

#### At Step 8: Facilitation of Focus Group Discussion

- This indicator covers eight topics which fall into three broad themes: community participation in planning (topics 1-3), community participation in implementation (topics 4-7), and community participation in monitoring and evaluation (topic 8). Facilitators should introduce and explain each as they move from one theme to another in the discussion.
- The terms *development programmes* or *development initiatives* are used here to refer to wider ongoing projects (for example, a micro enterprise development scheme or a primary health care project). These may be initiated and implemented solely from within the community, and/or be supported by World Vision or other agencies. The term *development activities* refers to specific short term tasks (for example, the installation of a well, repair of a school building, or an agricultural training event) within wider development programmes or initiatives. Similarly, these may be initiated and implemented solely from within the community, and/or be supported by World Vision or other agencies.
- It is likely that much of the discussion will centre around practical examples of specific development programmes and activities that are taking place (or have taken place) in that community. Facilitators need to ensure that discussion is not dominated by one or two specific activities (for example, a community road repair the previous year) but covers the range of development programmes and activities that are taking place (or have taken place) in that community. Otherwise this will skew the results.

#### Suggested Follow-Up Research

The results of these focus groups may indicate that additional research is needed in a community or the wider programme area to understand attitudes and practices relating to community participation. Please refer to *Transformational Development Indicators: Supplementary Resource Guide* for a more detailed discussion of *community participation*. Tools available for exploring this include:

- Stakeholder Analysis: This flexible tool can be used to help programme staff and partners reflect on who participates and how in different aspects of development processes and programmes. Explanations and examples, including various participation matrices, are included.
- PRA/PLA tools: Many of these participatory tools can also be adapted and used to explore the participation of different persons and groups in different aspects of development processes (for example, venn/chapati diagrams, matrix ranking, ten seed technique).

## TDI Instruments for Community Participation

### Discussion Guide for Community Participation for All Focus Groups

Step 8	<b>Facilitate discussion of the indicator by focus group participants, using the discussion guide</b> <i>Guide the discussion of the following topics and concepts using the guide questions, adapted, contextualised, and tested, according to Focus Group Guidelines in Volume 6</i>		
Discussion Topic	Key Concepts to be Explored		Guide Questions
1. Knowledge and understanding of development programmes	a) Level of knowledge of what development programmes or initiatives exist in the village/neighbourhood - <i>can include both WV supported development programme and others.</i>  b) Understanding of the purpose of different development programmes/initiatives.		What does the phrase 'community development' mean to you?  What community development programmes or initiatives are there in your village/neighbourhood?  Why are these development initiative/programmes taking place in your village/neighbourhood?
2. Source of development initiatives	a) Origin of development activities and programmes: - <i>From staff of World Vision and/or other development programmes, or</i> - <i>From community together with WV/other agency staff (to what extent?), or</i> - <i>From the community.</i>		Who initiated these development programmes/initiatives in your community, and how? Give examples. <i>(If there is no response, prompt with examples such as community leaders, women, local government, community organisations, World Vision.)</i>
3. Participation in programme planning	a) Extent of involvement of community people in development planning processes: - <i>Who was involved (e.g., no one, few, many)?</i> - <i>Type of involvement (e.g., responded to survey, PRA, attended meeting/s).</i> - <i>Regularity of involvement (never, rarely, sometimes, often).</i>		How were these development programmes/initiatives planned? What processes were used and why?  Who was involved in this planning, and how?  What was your involvement? How often?

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4. Knowledge about programme implementation	<ul style="list-style-type: none"> <li>a) Level of knowledge about how development activities are implemented.</li> <li>b) Means of communication in community about development activities (<i>e.g., no communication, people informed in/formally before or during, people consulted before</i>).</li> </ul>	<p>How were the activities in these development programmes implemented? Give examples.</p> <p>How did you hear about these activities and their implementation? How was this communicated in your village/neighbourhood?</p>
5. Decision making in programme implementation	<ul style="list-style-type: none"> <li>a) Level of knowledge and understanding about decision making processes in programme implementation (<i>who decides, how</i>).</li> <li>b) Extent to which community people have opportunities to be involved in, and to influence, decision making.</li> </ul>	<p>Who makes decisions about implementation of development programmes and activities in your village/neighbourhood?</p> <p>How do they arrive at those decisions?</p> <p>What opportunities do you have to be involved in, or influence, those decisions?</p>
6. Mutual responsibility for programme resources and budget	<ul style="list-style-type: none"> <li>a) Knowledge about development programme budgets/resourcing.</li> <li>b) Level of community resource contribution toward programme and activity budgets (<i>type of resources - materials, labour, financial; size of contributions; diversity of sources</i>).</li> <li>c) Extent of involvement in managing programme resources/budget.</li> </ul>	<p>Who contributes the financial and material resources for development programmes and activities in your village/neighbourhood?</p> <p>What resources does the community contribute (<i>e.g., financial, material, labour</i>) for these development programmes and activities? Give examples.</p> <p>What is the value of contributions from the community and other sources?</p> <p>Who is responsible for budgeting and managing these resources?</p>

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7. Participation in, and management of, programme activities	<p>a) Level of participation of community people in implementation of activities (<i>any involvement of and/or dependence on non-community members, e.g., WV/agency staff, contractors</i>).</p> <p>b) Extent of community involvement in supervision and management of activities (<i>any involvement of and/or dependence on non-community members, e.g., WV/agency staff, contractors</i>).</p>	<p>Who actually implements/carries out the development activities in your village/neighbourhood? Give examples. How have you been involved?</p> <p>Who manages/supervises the implementation of these development activities? Are community people part of this? How?</p>
8. Monitoring and evaluation	<p>a) Awareness of monitoring and evaluation (M&amp;E) of programmes and activities.</p> <p>b) Extent of community ownership and management of M&amp;E.</p> <p>c) Opportunities for community members to input and be involved in programme and activity M&amp;E.</p>	<p>How does your community monitor the progress of development programmes and activities undertaken?</p> <p>Who is involved in carrying out the monitoring and evaluation of programme activities in your village/neighbourhood? Who decides this?</p> <p>What involvement have you, your friends/relatives had in monitoring the progress of development programmes in your village/neighbourhood?</p>

# Community Participation Scorecard

Theme	Topic	None = 0	Low = 1	Medium = 2	High = 3
<b>Theme A:</b> Community Participation in Planning/ Design	1. Knowledge and understanding of development programmes	<b>Little knowledge of development programmes</b> or initiatives in their village/neighbourhood. <u>Do not know what development initiatives exist or why.</u>	<b>Some knowledge of development programmes</b> or initiatives in their village/neighbourhood. <u>A few examples of development activities given, but limited understanding of their purpose.</u>	<b>Good knowledge of development programmes</b> or initiatives in their village/neighbourhood. <u>Several examples of development programmes and activities, and the purpose of one or two of these can be explained.</u>	<b>Good knowledge and understanding of development programmes</b> or initiatives in their village/neighbourhood. <u>Several examples of development programmes and activities given. The purpose of these and how they are accomplished can be explained clearly.</u>
	2. Source of development initiatives	Initiatives for development activities and programmes <u>have come from World Vision staff or the staff of other agencies - with little or no community involvement.</u>	Initiatives for development activities and programmes <u>have come mainly from World Vision/other agency staff with some community involvement.</u>	Initiatives for development activities and programmes <u>have come from both World Vision/other agency staff and the community.</u>	Initiatives for development activities and programmes <u>have come mainly from the community.</u>
	3. Participation in programme planning	<b>No involvement</b> in the planning processes of development initiatives and programmes. People may be unaware of the planning processes and they were not involved in these at all.	People are aware of some of the planning processes, and <b>a few people were involved on at least one occasion</b> , e.g., attended a programme planning meeting or participated in a PRA/PLA exercise, or have been a respondent in a survey.	Most people understand the planning processes, and <b>some people were involved in the planning process at least a few times</b> , e.g., attended some programme planning meetings and/or participated in PRA/PLA exercises.	<b>Most people</b> have a good understanding of the planning processes of development programmes and <b>were involved regularly</b> in them, e.g., through active participation in programme planning meetings, PRA/PLA exercises, etc.
<b>Theme B:</b> Community Participation in Development Programme Implementation	4. Knowledge about programme implementation	<b>Little or no knowledge</b> about how development activities are implemented in their villages/ neighbourhoods. <u>It appears that there is no communication about this in the community.</u>	Some knowledge about how development activities are implemented in their villages/neighbourhoods. <b>People are informed about their implementation</b> through word-of-mouth or by other informal means <u>as they start or sometimes after these activities are already under way.</u>	Good knowledge about how development activities are implemented in their villages/neighbourhoods. <b>Most people were informed about their implementation through formal and informal means of communication well ahead of time.</b>	Excellent knowledge about how development activities are implemented in their villages/neighbourhoods. <b>People were consulted</b> about most development activities <u>through established means of communication.</u>
	5. Decision making in programme implementation	<b>Little understanding</b> of decision making processes in the implementation of development programmes and activities in their village/neighbourhood. <b>No opportunities for involvement or influence in this.</b>	<b>Some understanding</b> of the decision-making processes in development implementation – with <u>knowledge of who is involved in decisions.</u> <b>No opportunities for involvement or influence in this.</b>	<b>People know and understand who makes decisions and how they do so</b> in the implementation of development programmes and activities. There are <b>some limited opportunities for involvement and/or influence in this.</b>	<b>People understand</b> the decision-making process <b>and know how to take the opportunities to be involved and influence</b> that decision-making process (e.g., through the collective voice of local people).

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Theme	Topic	<i>None = 0</i>	<i>Low = 1</i>	<i>Medium = 2</i>	<i>High = 3</i>
	6. Mutual responsibility for programme resources and budget	<b>Little knowledge</b> or understanding about development programme budgets and resourcing. <b>Minimal resources are contributed</b> by the community to development activities.	<b>Sources of programme budgets</b> and the costs of some activities <b>are known</b> . <b>A few resources</b> (usually in-kind) <b>are contributed by the community</b> to development activities, along with contributions from other stakeholder groups (e.g., World Vision, local government, other agencies).	<b>Sources and rough levels of budget contributions are known</b> . <b>Most development activities include some community contributions</b> (in-kind and sometimes financial resources), along with contributions from other stakeholder groups (e.g., World Vision, local government, other agencies).	A <b>local committee coordinates the budget</b> for most development programmes. <b>Community and local government contributions of resources are at significant levels</b> , along with negotiated contributions from World Vision and/or other agencies.
	7. Participation in and management of programme activities	<b>Little participation</b> of community people in <b>implementing</b> activities in their villages/neighbourhoods. Most activities have been implemented by non-community members (e.g., WV/other agency workers, contractors). <b>All management and supervision by non-community members.</b>	Community people <b>participate in implementing some activities</b> in their villages/neighbourhoods, often with the assistance and facilitation of WV/other agency staff. <b>Management and supervision is by non-community members</b> (e.g., WV/other agency workers, contractors).	<b>Most activities are implemented directly by community people.</b> Supervision and <b>management of activity implementation is usually shared by community members and non-community members</b> (e.g., WV/other agency workers, contractors).	<b>Most activities are implemented and managed by community people.</b> Assistance from non-community members (e.g., WV/other agency workers, contractors) in facilitation or technical support is discussed and agreed between community members and these partners as needed.
<b>Theme C:</b> Community Participation in Programme Monitoring and Evaluation	8. Monitoring and evaluation	<b>People are unaware</b> of any monitoring or evaluation of development programmes and activities. They <b>had not been asked for their views</b> on the progress/success of programmes in their village/neighbourhood.	<b>People are aware</b> of monitoring or evaluation of development programmes/activities <b>but only by non-community members</b> . Community members <b>have sometimes been consulted</b> for their views on the progress/success of programmes in their village/neighbourhood.	Community members <b>are aware and have been involved</b> in monitoring and evaluation of development programmes (e.g., through data gathering and/or analysis). Community members' views on the progress/success of programmes in their village/neighbourhood have been taken into account.	Community members <b>carry out their own</b> evaluation and monitoring activities which interact with both community needs for information as well as other stakeholders (e.g., local government, World Vision).

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### Focus Group Log Sheet

TDI Focus Group Log Sheet				Complete Log Sheet at Step 9 and Step 13				
TDI: Community Participation				Log sheet completed by _____(name) on _____(date)				
Community and Participant Information								
Name and location of community:								
Community selection criteria:		Community selection category:						
Any comments on selection of community:								
FG participants (girls/boys/men/women):		Number of participants:						
Any comments on selection of participants:								
Focus Group Facilitation Information								
Date of focus group:		Facilitator (name + gender):						
Recorders' (names + genders):	a) _____ b) _____	Observer (name + gender):						
Recording method	<input type="checkbox"/> note taking <input type="checkbox"/> tape recording <input type="checkbox"/> note taking & tape record							
Any comments on FG facilitation:								
Focus Group Analysis, Scoring, and Reporting Information								
Date of meeting:		Rating committee members (names):						
Scores assigned for:								
<u>Topic 1</u>	<u>Topic 2</u>	<u>Topic 3</u>	<u>Topic 4</u>	<u>Topic 5</u>	<u>Topic 6</u>	<u>Topic 7</u>	<u>Topic 8</u>	<u>Total Scores</u>
Analysis worksheets completed by (name):					Completed log sheet and analysis worksheets submitted to (name):			
Any comments on analysis and scoring process:								

## Analysis Worksheets for Focus Groups

### Sample Analysis Worksheet (for Topic 1)

**Step 10** Discuss focus group contents/data for topic 1, with analysis worksheet as a guide. Record key points and notable quotes in analysis worksheet

#### Topic 1: Knowledge and understanding of development programmes/initiatives

Key Concepts Explored	
a)	Level of knowledge of what development programmes or initiatives exist in the village/neighbourhood - <i>can include both WV supported development programmes and others.</i>
b)	Understanding of the purpose of different development programmes/initiatives.

Key Points - covering the full range of opinions expressed in the discussion; must represent both the most common comments from participants and any significant differences that emerged	Notable Quotes/Examples - comments which best illustrated the key points, memorable individual comments, any important differences of perspective and opinion that were voiced

**Step 11** Assign scores for topic 1, with scorecard and analysis worksheet as guides

Score Range			
None = 0	Low = 1	Medium = 2	High = 3
Little knowledge of development programmes or initiatives in their village/neighbourhood. Do not know what development initiatives exist or why.	Some knowledge of development programmes or initiatives in their village/neighbourhood. A few examples of development activities given, but limited understanding of their purpose.	Good knowledge of development programmes or initiatives in their village/neighbourhood. Several examples of development programmes and activities, and the purpose of one or two of these can be explained.	Good knowledge and understanding of development programmes or initiatives in their village/neighbourhood. Several examples of development programmes and activities given. The purpose of these and how they are accomplished can be explained clearly.



## Proforma Analysis Worksheet for Topics 2-8

**Step 12 (a)** Discuss focus group contents/data and assign scores for topics 2-8 with analysis worksheets as guides. Record key points and notable quotes in analysis worksheet.

**ENTER:** Topic number and topic name

<i>Key Concepts Explored</i>
<b>ENTER THE KEY CONCEPTS EXPLORED FOR THIS TOPIC – FROM THE DISCUSSION GUIDE</b>

**Key Points** - covering the full range of opinions expressed in the discussion; must represent both the most common comments from participants and any significant differences that emerged

**Notable Quotes/Examples** - comments which best illustrated the key points, memorable individual comments, any important differences of perspective and opinion that were voiced

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**Step 12 (b)** Discuss focus group contents/data and assign scores for topics 2-8 with analysis worksheets as guides. Circle the assigned score: 0 (none), 1 (low), 2 (medium), or 3 (high).

Score Range			
None = 0	Low = 1	Medium = 2	High = 3
<b>ENTER THE</b>	<b>SCORE CARD</b>	<b>PORTION FOR</b>	<b>THIS TOPIC</b>

## Summary TDI Report, Community Participation (Tables R1, R2, R3, and R4)

The summary results reported here should represent all eight focus groups conducted for measurement of the *community participation* indicator, i.e., two groups each of men, women, girls, and boys (youth aged 12-16) from two different communities. Please complete the four tables below following the instructions in Step 18 of the *Focus Group Guidelines* in Volume 6 of this field guide. Volume 8 also includes example TDI reports.

<b>Table R1: General Programme information</b>								
<b>Country:</b>				<b>Programme Name:</b>				
<b>Year Programme Started:</b>				<b>Programme Number:</b>				
<b>Previous year(s) of TDI measurement:</b>								

  

TDI Focus Group Summary Information Sheet <b>Table R2: Complete at Step 18 with log sheets from all 8 FGs</b>								
<b>Community Participation</b>		Submitted as part of TDI report by _____ (name) to _____ (name) on _____ (date)						
	Men 1	Men 2	Women 1	Women 2	Girls 1	Girls 2	Boys 1	Boys 2
<b>Community and Participant Information</b>								
Community name/location:								
Community selection criteria:								
Community selection category:								
Number of participants:								
<b>Focus Group Facilitation Information</b>								
Date of focus group:								
Gender of facilitator:								
Recording method (note taking +/- or tape recording):								
<b>Focus Group Analysis, Scoring, and Reporting Information</b>								
Number of ratings committee members:								
Date of meeting:								
Date of FG report:								
Number of quotes in TDI summary report:								
<b>Explanatory comments and learning from the process (successes, problems, suggestions on process)</b> <b>Comments on:</b>								
Community selection:								
Participant selection:								

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FG facilitation and recording:	
Analysis, scoring, and reporting from FGs:	
Other:	

TDI Focus Group Summary Score Sheet <b>Table R3:</b> Complete summary sheet at Step 18 with log sheets from all 8 FGs									
<b>Community Participation</b> Submitted as part of TDI report by _____ (name) to _____ (name) on _____ (date)									
Topic	Men 1	Men 2	Women 1	Women 2	Girls 1	Girls 2	Boys 1	Boys 2	Total
1. Knowledge of development programmes									
2. Source of development initiatives									
3. Participation in programme planning									
4. Knowledge about programme implementation									
5. Decision making in programme implementation									
6. Mutual responsibility – budget/resources									
7. Participation in, and management of, activities									
8. Monitoring and evaluation									
<b>Total</b>									

TDI Focus Group Summary – Narrative Report: *Selected Sample Key Points, Quotes, and Examples*

**Community Participation**

**Table R4:** Complete at Step 18: from 8 focus groups (2 men, 2 women, 2 girls, 2 boys) in 2 communities

<p><b>Below:</b> shade boxes showing scores of W1, W2, M1, M2, G1, G2, B1, B2 focus groups</p>						<p><b>Below:</b> write one key point (1-2 sentences) and 1-3 quotes from focus groups for each topic. These are to be selected following the guidelines in Step 17 of this chapter. In brackets, note in bold the focus group source of each point or quote – from women/men/girls/boys in community 1 or 2 (e.g., <b>G1</b> or <b>M2</b>); note in italics the type of comment – Representative, Divergent, or high Interest (<i>R</i> or <i>D</i> or <i>I</i>)</p>					
No. of Groups						<p><b>Topic 1: <i>Knowledge of development programmes</i></b>  <i>Key Point:</i></p>     <p><i>Notable Quote/Example:</i></p>					
	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>							
Scores Given											
No. of Groups						<p><b>Topic 2: <i>Source of development initiatives</i></b>  <i>Key Point:</i></p>     <p><i>Notable Quote/Example:</i></p>					
	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>							
Scores Given											
No. of Groups						<p><b>Topic 3: <i>Participation in programme planning</i></b>  <i>Key Point:</i></p>     <p><i>Notable Quote/Example:</i></p>					
	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>							
Scores Given											

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No. of Groups					<b><u>Topic 4:</u> Knowledge about programme implementation</b> <i>Key Point:</i>  <i>Notable Quote/Example:</i>
	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>	
	<b>Scores Given</b>				

No. of Groups					<b><u>Topic 5:</u> Decision making in programme implementation</b> <i>Key Point:</i>  <i>Notable Quote/Example:</i>
	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>	
	<b>Scores Given</b>				

No. of Groups					<b><u>Topic 6:</u> Mutual responsibility for programme resources/budget</b> <i>Key Point:</i>  <i>Notable Quote/Example:</i>
	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>	
	<b>Scores Given</b>				

No. of Groups					<b><u>Topic 7:</u> Participation in, and management of, programme activities</b> <i>Key Point:</i>  <i>Notable Quote/Example:</i>
	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>	

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	Scores Given				
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No of Groups					<b>Topic 8: Monitoring and evaluation</b> <i>Key Point:</i>  <i>Notable Quote/Example:</i>
	<b>0</b>	<b>1</b>	<b>2</b>	<b>3</b>	
	<b>Scores Given</b>				

## Chapter 2. Social Sustainability

### Introduction

Sustainability is one of three defining characteristics of transformational development (TD) in World Vision's mission statement. It is thus one of the principles in World Vision's TD policy, which states that *"transformational development programmes are designed with the expectation that the changes are sustainable economically, environmentally, socially, psychologically and spiritually."*

The concept of sustainability is a broad and complex one. This indicator is intended to measure only social aspects of sustainability, in particular the capacity of local community-based organisations (CBOs). World Vision's transformational development framework recognises that *"community based organisations are important in the TD partnership between communities and World Vision"*. CBOs have a vital role toward creating *interdependent and empowered communities* - the fourth domain of change in WV's TD framework and policy, under which this indicator fits. The focus of this *social sustainability* indicator is on CBOs, due to:

- The widely acknowledged importance of institutional capacity building in sustaining community development.<sup>1</sup>
- The priority which many World Vision development programmes place on creating and/or strengthening local organisations they hope will sustain development after World Vision funding ceases in the area.

### TD Indicator

*The transformational development indicator for social sustainability is:*  
**Social sustainability of community development.**

*Social sustainability* is defined as the capacity within local community organisations to sustain the long term viability and impact of development processes. This capacity is focused on how conditions for social sustainability are created through the character, functioning, resource mobilisation, and networking skills of community organisations.

### Measurement & Analysis

Secondary data is obtained from a review of development programme and community organisation documents. Primary data is collected from guided focus group discussions with office bearers and members of community organisations. Information is analysed and indexed by a consultant using specific rating guidelines.

The indicator is measured through a two-part process led by a selected local consultant. Document review and staff interview at the programme level are used to assess the number, scope, and classification of community organisations in the programme area. Focus group discussions are held with office bearers and members of four selected community organisations. The groups, along with a review of the CBO documents, assess the character, functioning, resource mobilisation, and networking skills of these community organisations. A similar focus group and document review process is also carried out with the programme-wide CBO partner, where one exists. Information from these focus groups and document reviews is analysed by a

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<sup>1</sup> See bibliography for references.

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consultant who identifies key points, examples, and quotes, and assigns scores for each of the ten topics assessed. These results are validated with programme staff, who retain the rich qualitative discussion notes for use with community organisations and the World Vision National Office. For the purposes of global TDI monitoring, the CBO classification table, scores, selected key points, and quotes from document review and focus groups are reported.

The procedures for measuring the *social sustainability* indicator are described in detail in this chapter. Instruments needed for measuring this TDI are also included (discussion guide, scorecard, log sheet, analysis worksheets for the focus groups, CBO classification sheet, and document review checklist). Additional guidance and examples on planning, facilitating, and analysing focus groups are detailed in the *Focus Group Guidelines*, Volume 6 of this field guide.

### Community Organisations and the Measurement of this Indicator

Community based organisations (CBOs) may be broadly defined as grassroots organisations managed by members on behalf of members. For the purpose of this indicator, *community organisations are voluntary bodies comprised of people from local communities which perform certain functions that contribute to improvement in their members' quality of life.*

There is a diverse range of community organisations with which World Vision development programmes partner. Differences in the type of community organisation can include their scope, level, function, membership, and origins, and may reflect country context and/or the history and strategy of different World Vision entities. These bodies might be known as village development committees, rural/urban development societies, women's associations, children's clubs, programme committees, or by a range of other names. They may have existed in the area before the start of a WV development programme and now be working with WV, or the programme might have facilitated the formation of these organisations.

The measurement of this indicator includes identification and classification of community organisations in the programme area. The document review and focus group methods should only be applied to community organisations (as defined above) with which World Vision is working closely. Where World Vision programmes have no community organisation partners at all, this indicator should not be measured. It should, though, be measured in programmes where there are existing community organisations with which WV plans to partner, or where there are community organisations that have been newly created with WV's support. The topics, questions, and scorecard are designed for community organisations with a broad community development function rather than those whose scope is more limited (for example, to a specific activity/intervention, such as a savings group).



### Measurement Procedure for Social Sustainability

Twenty-five steps are documented below to lead development programmes through measurement, data analysis, and reporting for the *social sustainability* indicator.

#### Preparation

##### **Step 1    Selection of consultant**

The measurement of this indicator is led by a consultant who is external to the programme in which it is being measured. A guide for preparing terms of reference for this consultant, including criteria and steps for their selection, is included in this chapter.

##### **Step 2    Selection of focus group data collectors**

Throughout the procedures for measuring this indicator the consultant will need to work with programme staff. For focus group discussions, s/he will need to work with a team of three other data collectors. Follow the steps and instructions in the *Focus Group Guidelines*, Volume 6 of this field guide, to select these data collectors.

Once the consultant is selected, the following preparatory steps must be completed by the consultant, programme manager, and team of data collectors for the focus groups:

##### **Step 3    Translation of relevant TDI documents**

The following chapters or volumes of the *TDI Field Guide* will need to be translated into the local language used by the consultant, focus group data collectors, and participants:

- *Introduction to TDI*, Chapter 1 of Volume 1.
- *Social Sustainability*, Chapter 2 of Volume 5 (this chapter).
- *Focus Group Guidelines*, Volume 6.

To translate these documents, follow the steps and instructions in the *Translation Guidelines* in Volume 1 of this field guide. This translation may be carried out centrally through the WV National Office prior to TDI measurement by the programme.

##### **Step 4    Orientation of consultant and focus group data collectors**

It is important that the consultant is oriented to the WV development programme, and for the consultant and other data collectors to be oriented to TDI, particularly the indicator and method on social sustainability.

- The consultant, programme staff, and data collectors should study the three relevant TDI sections (*Introduction to TDI* in Volume 1, *Social Sustainability* (this chapter), *Focus Group Guidelines* in Volume 6).
- The consultant should visit the programme to familiarise him/herself with the programme and staff.

##### **Step 5    Focus group training and practice**

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Under guidance of the assigned focus group coordinator for TDI measurement, the focus group data collectors (and consultant where possible) should:

- Participate in focus group training (*module 4 of TDI Training resources*).
- Conduct field practice of focus group methodology with the social sustainability discussion guide, adapting the guide questions for the local context. (See *Focus Group Guidelines* in Volume 6 for guidance.)

### Programme level - Document Review and Interview

#### Step 6 Programme staff interview

Once preparation is completed the consultant should meet with programme staff to gather information and documents on community organisations in the area. During this meeting the consultant should conduct Steps 6-8:

- Interview staff to gain an understanding of community organisations in the area, and the WV development programme's relationship with them.



*A few simple, open-ended questions such as these examples may be useful:*

- Which community organisations exist in the programme area?
- Which community organisations does the programme partner with? Why?
- What were the origins of these organisations?
- Who are their members?
- What is their function?
- How many communities do/do not have these organisations?
- What is the programme's relationship with these organisations?



#### Step 7 Complete CBO classification sheet

Together with programme staff, the consultant should complete the CBO classification sheet (which may be found later in this chapter), including: the number, scope, context, type, level, function, membership, and origins of community organisations with which WV's programme partners. Refer to the CBO classification guide later in this chapter for explanations and examples. Enter the information required in the classification sheet matching the local situation to the greatest extent possible.

#### Step 8 Identify and gather programme documents for review

Identify and gather relevant programme documents for review. See the document review checklist later in this chapter.



*These could include programme design documents, annual plans, quarterly and/or annual reports, evaluation reports, and specific documents relating to community partner organisations, or WV national strategies on partnership and capacity building with CBOs.*

#### Step 9 Conduct programme document review

After the meeting with programme staff, the consultant conducts a review of the documents identified.



*A suggested process for the document review is:*

- a) *Review all selected programme/ADP documents and highlight/note any contents related to community organisation partners.*
- b) *Carefully read all parts of documents relating to community organisation partners.*
- c) *Refer to the ten topics covered in the social sustainability question guide and scorecard – under the 3 themes of character and composition, functioning, networking and resource mobilisation of community organisations.*
- d) *Note any points from the documents reviewed which relate to these ten topics. Keep these notes for reference and use in Steps 16 and 17 – community organisation document review, analysis, and scoring.*
- e) *Complete the document review checklist (found later in this chapter).*

### Community Organisation Focus Group Discussions and Document Review

The purpose of Steps 10 to 16 is to validate the secondary information already collected and to gather primary information through focus group discussions with office-bearers and members of community organisations.

#### **Step 10**   **Selection of community organisations for focus groups**

It is likely that there are variations in the character, composition, functioning, resource mobilisation, and networking of community organisations in the programme area. There may also be different types and levels of community organisation partners. Measurement of this indicator needs to reflect these variations to a reasonable extent. A range of opinions, experiences, and scores is desirable among the focus groups. Four community organisations should therefore be selected for focus group discussions, with the aim of getting a reasonably representative sample. Where a programme-wide CBO partner exists (for example, partner NGO/CBO, programme committee, Board, association of local CBOs, apex body, coordinating committee) this should also be selected, making a total of five focus groups.

The process recommended for the selection of four community organisations by the consultant with the guidance of programme staff is:

- a) Refer to the completed CBO classification sheet, the section on function of community partner. List all the village/community level organisations that come under the ‘general community development’ category.
- b) Identify any important differences among the listed community development organisations. For example: long established or recently established CBOs, functioning well or poorly, different origins (initiated by community, WV, or others), membership (gender specific, such as women’s association, or gender inclusive).
- c) Decide which criteria from these are most important. Then divide the organisations listed accordingly into different categories (for example, 18 long established and 12 recently established CBOs).

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- d) Select four community organisations randomly from within these different categories, for example, two randomly selected from the 18 long established CBOs, and two randomly selected from the 12 recently established CBOs).

<b>Step 11</b>	<b>Selection of participants for focus groups from office bearers and members of CBO</b>
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Once the selection of community organisations is complete, they should be contacted to make arrangements for the focus group discussions, and to select and invite participants. Focus groups are most effective with between eight and twelve participants. The aim is to select four to six office bearers and four to six regular members from the community organisation. Procedures for selecting these participants will vary depending on a range of factors, such as the structure and functions of the community organisation. Efforts should be made to ensure that where possible:

- Key leadership and essential administrative functions are represented.
- There is a reasonable gender balance amongst participants.
- No particular groups or individuals are excluded due to vulnerability or prejudice (for example, CBO members with a disability, elderly CBO members).
- Potential for bias in selection is avoided by the use of random selection methods where appropriate.



*For example, a programme-wide CBO has a governing body made up of representatives from 25 individual community level organisations. It has an executive/administrative body of five staff. The selection process might be to select three of the executives, including the leader, treasurer, and one other (one or two of these would be women), and to randomly select nine of the 25 community level representatives.*

*For example, a community organisation has six elected office bearers and 245 local villagers who would be considered as members. The process might be to select all six office bearers and randomly select six of the 245 villagers by drawing slips of paper with names/numbers from the village population list.*

*For example, a community organisation has sub-groups of a women's association, children's society, and farmer's club. It is led by one appointed local leader and the chair of each sub-group. The process might be to select the leader, the chair of each of the three sub-groups, and randomly select three persons from the women's association, three from the children's society, and three from the farmer's club, thus making a total of 13 persons.*

### The Focus Group Discussions

A team of data collectors (one facilitator, two recorders, and one observer) will be responsible for conducting the five focus group discussions with the four selected community organisations and one programme-wide CBO partner. For this indicator it is recommended that the consultant takes the role of a recorder, while the other three persons are those who have already conducted focus groups for measurement of another TDI (community participation, emergence of hope, or caring for others). For this indicator it is recommended that only one group of data collectors conducts all five focus groups, so the consultant can be present in each one.

#### **Step 12 Introduce the focus group – it's purpose and the people involved**

Once participants are gathered, the facilitator should lead introductions and set the scene, explaining the purpose and topic of the discussion. For guidance and examples of focus group introductions refer to *Focus Group Guidelines*, Volume 6 of this field guide.

#### **Step 13 Facilitate discussion of the indicator by focus group participants, using the discussion guide**

The discussion guide (found later in this chapter) should be used to facilitate the discussion by participants regarding the ten topics within the social sustainability indicator. See Volume 6, *Focus Group Guidelines*, for detailed advice and examples on facilitation and recording of focus group discussions.

#### **Step 14 Identify and gather community organisation documents for review**

After the focus group discussion is finished the consultant should enquire and request if there are any community organisation documents available which the office bearers of the organisation are willing to share with him/her for document review. See the document review checklist later in this chapter.



*These could include: official registration documents, organisational chart, descriptions of roles/responsibilities, plans and proposals, budgets, financial records, reports, meeting minutes, notebooks, or other types of documents.*

#### **Step 15 Review the process**

Immediately after the focus group discussion is finished and arrangements for gathering documents are complete, the recorders, facilitator, and observer should meet to discuss any learning from the process (CBO/participant selection and focus group facilitation). This should include topics such as what went well, what was difficult, any learnings for next time. Note any important comments in the focus group log sheet (to be found later in this chapter), and ensure all its relevant sections are completed correctly. (See the *Focus Group Guidelines*, Volume 6 of this field guide, which includes advice and examples for completing log sheets.) Ensure that notes are complete and/or tape recordings are gathered. Make arrangements to meet for the validation of the consultant's analysis and scoring of the focus group.

**Step 16 Conduct community organisation document review**

As soon as possible after each of the focus group discussions (within 24 hours at most) the consultant should review the documents made available, following a similar process as for programme documents. If no documents from the community organisation are available then steps a), b), and c) below can be skipped.



- a) *Read all documents provided by community organisations.*
- b) *Note any points from the documents reviewed which relate to the ten topics covered in the focus group discussion.*
- c) *Any major points noted should be recorded in the document review section of Analysis Worksheets 1 – 10. Refer to notes from the programme/ADP level document review and add any relevant points.*
- d) *Complete the document review checklist (found later in this chapter).*

**Analysis and Scoring**

Once the review of documents from the community organisation is complete the consultant can carry out the analysis and scoring for this indicator. This should be done within 24-48 hours of each focus group discussion. The consultant could do this process on his/her own. However, if the consultant prefers, he/she can request that the focus group facilitator, observer, and other recorder join for a discussion of the outcomes. Both recorders' notes must be gathered, ensuring that they are completed and in good order. If there are discrepancies between the information collected through document review and focus group discussions, the information collected through focus group discussions should be used. The consultant and any other persons present should ensure that they have a copy of, and are familiar with, the scorecard and analysis worksheets. The following steps are suggested for analysis and scoring:

**Step 17 Review focus group contents/data for topic 1, with analysis worksheet as a guide**

- For topic 1, refer to the recorders' notes from the discussion of each question from the question guide. If present, the observer and facilitator can add any important comments they recall or observations they made. If tape recordings have been made, these can be used as needed.
- Decide on the key points that emerged from the focus group discussion and document review for this topic. These key points must cover the full range of opinions expressed in the discussion and represent both the most common comments from participants and any significant differences that emerged. All key points should be recorded carefully in the column on the analysis worksheet.
- Identify any examples or quotes of particular interest from participants on this topic. Quotes or examples may include those comments which best illustrate the key points, memorable individual comments, any important differences of perspective and opinion that were voiced. Notable quotes/examples should be recorded carefully in the column on the analysis worksheet.

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A sample analysis worksheet for topic 1 of this indicator is included in this chapter. Further guidance and examples on the use of analysis worksheets are given in *Focus Group Guidelines*, Volume 6.

### **Step 18** Assign score for topic 1, with scorecard and analysis worksheet as guides

- Carefully read the descriptions in the scorecard for the topic, so these are well understood.
- Decide which description level best matches the contents of the focus group discussion and document review for topic 1.
- Record the assigned score (0 = none, 1 = low, 2 = medium, or 3 = high) by circling the appropriate level on the analysis worksheet.

### **Step 19** Review focus group contents/data and assign scores for topics 2-10, with analysis worksheets as guides

Repeat the procedures from Steps 17 and 18 for topics 2-10 until all analysis worksheets have been completed, with key points, notable quotes/examples, and scores assigned for all topics.

### **Step 20** Validation

Once the analysis and scoring for all five focus groups has been completed by the consultant, he/she should then meet with the programme manager and the programme level committee/CBO to validate the results. Where there is no programme level committee/CBO the consultant and programme manager may decide to invite chairs of village/neighbourhood level community organisations to the validation meeting. If they do not invite these persons, then they may invite other programme staff instead.

The following process is recommended for the validation meeting:

- a) The consultant will explain the results topic by topic for each CBO, sharing the scores given and the reasons for them. Where the consultant still has questions to clarify, he/she will ask programme staff and CBO representatives for more information.
- b) The consultant will invite questions and feedback from CBO representatives and programme staff, topic by topic, in order to verify if they agree with the information and scores given.
- c) If any new information emerging from the discussion leads to the consultant's assessment changing, then the consultant may decide to adjust those scores accordingly.
- d) Any points of disagreement with staff and community representatives should be discussed openly, but handled with care and sensitivity. The consultant's decision on scores is final, but any remaining significant differences should be discussed with the assigned focus group coordinator for measurement of TDI in that programme.

### **Step 21** Complete focus group records

When the validation meeting is complete, the consultant should complete the focus group log sheet (found later in this chapter) by:

- Entering the scores for topics 1-10 and the total scores.



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- Completing any other remaining sections in the log sheet, including any comments on the analysis, scoring, and validation process (for example, what went well, what was difficult, any learnings for next time).

The focus group log sheets and ten completed analysis worksheets for each of the five focus groups should then be collated in order to prepare the summary TDI report for social sustainability.

### **Step 22** Archive focus group notes/recordings

WV programme staff should collect and file the complete recorders' notes and/or tape recordings from all focus groups. Ensure that these are stored in a safe and accessible location as these represent the full complete record of the focus groups and may be used and referred to again for further research, learning, validation, and operational audit.

### **TDI Reporting**

After all five focus groups have been conducted, analysed, scored, and validated, the summary TDI report for social sustainability can be written. Formats for this report are included later in this chapter, and an example report is also included in Volume 8 of this field guide. The recommended procedure for completing and submitting the summary report for this TDI is:

### **Step 23** Gather all completed FG records (log, classification, document review, analysis worksheets)

Gather all the following completed forms:

- Focus group information log sheets.
- CBO classification sheet.
- Document review sheet.
- Analysis worksheets from all five focus groups (*or 4 where no programme-wide CBO partner exists*).

### **Step 24** Selection of key points and quotes from focus groups for the indicator

The inclusion of a selection of quotes and key points on each indicator topic gives an opportunity for the voices of focus group participants to be heard more widely than by those present. This provides an important complement to the rating scores, and will enhance the use and interpretation of data from this indicator at the programme level and beyond.

The selection of key points and quotes from the five focus groups for inclusion in the summary report should follow these guidelines and process:

- a) The consultant reviews the five analysis worksheets from different focus groups on a specific topic. For example, topic 2: leadership, he/she considers the similarities and differences on this topic amongst the five CBOs.
- b) The consultant takes three colour pens/pencils/highlighters and marks on the five analysis worksheets for each topic:



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- One to two Representative (R) key points and/or quotes: the key points and quotes which he/she feels best represent the rating scores for the different groups on this topic.
  - One Divergent (D) point and/or quote: any point, quote, or example which is different from others, but he/she feels represents an important minority perspective.
  - One high Interest (I) quote or example: any other quote or example which he/she feels is of special interest.
- c) Record these key points and quotes in summary narrative report (Table R4). Note in bold the focus group source (i.e., CBO 1, 2, 3, 4 or 5). Note in italics the type of comment it is, (i.e., Representative, Divergent or High Interest).



*“Election of programme committee members is done in all villages in the programme area after every three years.” (CBO5, R) This is a representative quote from the focus group with the fifth community organisation – the programme-wide CBO partner.*



*“They come to serve the community, not to get served by it.” (CBO3, I) This is a high interest quote from the focus group with the third community organisation.*



*“Although I am still a young woman, I was chosen as a member of the village council because I always participate in development activities.” (CBO2, D) This is a divergent quote from the focus group with the second community organisation.*

### Step 25 Complete report Tables R1, R2, R3, and R4, and submit report for the indicator

- a) Complete the general programme information sheet (Table R1 – found later in this chapter) with general information on the country and development programme.
- b) Complete the focus group summary information sheet (Table R2 – found later in this chapter) using the process data from the five focus group log sheets.
- c) Complete the focus group summary score sheet (Table R3) using the scores data from the five focus group log sheets.
- d) Complete Table R4 using the scores from Table R3 and key points, notable quotes, and examples selected in Step 24 above.
- e) Submit the completed Tables R1, R2, R3, R4, and the CBO classification sheet to the focus group coordinator for TDI measurement in this programme.

For further guidance and examples on completing these report tables refer to the Volume 6, *Focus Group Guidelines*, and Volume 8 on analysis and reporting.

## Suggested Follow-Up Research

The results of the document reviews and focus groups may indicate that additional research is needed in a community or the wider programme area to understand attitudes and practices relating to social sustainability. Please refer to *Transformational Development Indicators: Supplementary Resource Guide* for a more detailed discussion of *social sustainability*. Some tools and approaches for exploring this in more depth are:

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- Organisational self-assessments. There are many forms of self-assessments used in organisational development and capacity building with CBOs. These may use and/or develop community capacity indicators, organisational life phases and milestones, ranking and scoring methods, spider diagrams.
- Assessment of roles and responsibilities during transition. Tools are available to assess the extent to which critical project functions are managed by a community organisation or by the WV programme.
- Further study of secondary information. In many countries there will already be significant research and learning about community organisations and social sustainability. Contacting relevant agencies and networks, and/or conducting literature reviews may be useful in understanding the strengths and weaknesses of different models of community organisation, factors that enhance sustainability, etc.

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### TDI Instruments for Social Sustainability

#### Discussion Guide for Social Sustainability Focus Groups (with Office Bearers and Members of CBOs)

Step 13		Facilitate discussion of the indicator by focus group participants, using the discussion guide <i>Guide the discussion of the following topics and concepts using the guide questions, adapted, contextualised, and tested, according to Focus Group Guidelines in Volume 6</i>	
Discussion Topic	Key Concepts to be Explored	Guide Questions	
1. Representation and involvement of community members	a) Extent to which the community organisation represents the diversity of people in the community, for example: <ul style="list-style-type: none"> <li>- <i>Level of involvement of community people as members.</i></li> <li>- <i>Inclusion (or exclusion) of certain social, economic, ethnic, or age groups.</i></li> <li>- <i>Focused on elite or cares for all including the poorest/marginalised.</i></li> </ul>	Who are the members of the organisation? What is involved in becoming and being a member? Which different social, economic, ethnic, age, or other groups in your community are represented in the organisation? How? At what levels in the organisation?	
2. Leadership	a) Connection/relationship of leaders to community members, <i>e.g., leaders from elite group or normal community members; relations distant, as patrons, or close.</i> b) Selection and accountability of leaders – <i>the clarity, transparency, and regularity of selection and replacement processes.</i>	Who are the leaders of the organisation? What are the processes and criteria for selecting and replacing leaders? How does someone's social, economic status, age, or education level affect their chance of becoming a leader? Give examples. Describe the relationship between leaders and members of the organisation? Give examples.	

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3. Decision making	<ul style="list-style-type: none"> <li>a) Level of participation in decision making processes – <i>by leaders and members.</i></li> <li>b) Planning/budgeting processes – <i>are they open to community members input/influence?</i></li> </ul>	<p>How are decisions made in the organisation? Give examples.</p> <p>Who decides on the organisation's plans, budgets, and activities? How?</p>
4. Gender profile and roles	<ul style="list-style-type: none"> <li>a) Gender balance in leaders/office bearers of organisation: <i>are women included, how many?</i></li> <li>b) Level of women's participation as members, and involvement in decision making processes.</li> </ul>	<p>What roles do women and men have at different levels of the organisation?</p> <p>Are women represented in organisational leadership? Are women actively involved in the organisation's decision making? How? Give examples.</p>
5. Organisational vision and purpose	<ul style="list-style-type: none"> <li>a) Clarity of organisational purpose/objectives.</li> <li>b) Nature of objectives: <i>are these limited to physical needs or more transformational, do they include well being and rights of children?</i></li> <li>c) Awareness/involvement of members and leaders in development of objectives.</li> <li>d) Vision and commitment for long term future.</li> </ul>	<p>What are your organisation's aims and objectives?</p> <p>How were these arrived at? Who was involved and who knows about these?</p> <p>What future dreams do you have for your community, and your organisation? (<i>e.g., in 10-15 years time</i>) How do you plan to realise these dreams?</p>
6. Management of the organisation	<ul style="list-style-type: none"> <li>a) Clarity of roles and responsibilities in the organisation.</li> <li>b) Selection process for office bearers.</li> <li>c) Financial procedures and record keeping: <i>observance of good procedures (with checks and balances) and maintenance of records.</i></li> </ul>	<p>Describe how your organisation is managed.</p> <p>What are the different roles and responsibilities? How are these assigned? To whom? How are these persons selected?</p> <p>How are the finances managed? What procedures do you have? What records are kept? How are they maintained &amp; checked?</p>

## transformational development indicators

7. Organisational meetings	<ul style="list-style-type: none"> <li>a) Regularity of meetings.</li> <li>b) Level of attendance/participation in meetings.</li> <li>c) Purpose/content/outcomes of meetings: <i>just for information sharing or discussion and decision of issues.</i></li> <li>d) Record keeping, follow up, and planning of meetings.</li> </ul>	<p>Does your organisation have meetings? How often?</p> <p>Who normally attends these meetings (<i>and how many</i>)? How are they conducted?</p> <p>What is the purpose of these meetings? What are the outcomes?</p> <p>Are any records/minutes of meetings taken?</p> <p>What happens between meetings - how are they followed up and planned?</p>
8. Relationship between the programme and the organisations	<ul style="list-style-type: none"> <li>a) Level of organisation's dependency on, or autonomy from, WV programme: <ul style="list-style-type: none"> <li>- <i>In managing their organisation.</i></li> <li>- <i>In managing projects/activities.</i></li> <li>- <i>In undertaking initiatives.</i></li> <li>- <i>In organisational meetings.</i></li> <li>- <i>In engaging with wider issues.</i></li> </ul> </li> </ul>	<p>Describe the relationship between your organisation and the WV development programme.</p> <p>On what topics/issues/activities do you work together? How? Who does what?</p> <p>What is their role in relation to your organisation?</p> <p>What initiatives and activities have you undertaken without the involvement of the WV development programme? Give examples</p>
9. External linkages	<ul style="list-style-type: none"> <li>a) Strength of organisation's relationship with local government and other NGOs: <ul style="list-style-type: none"> <li>- <i>Regularity of contact with GOs and NGOs.</i></li> <li>- <i>Type of contact with GOs and NGOs (e.g., part of network, coalition).</i></li> <li>- <i>Legal status (e.g., registered with government).</i></li> <li>- <i>Utilisation of GO/NGO services.</i></li> </ul> </li> </ul>	<p>Describe the relationship between your organisation and local government organisations.</p> <p>Is your organisation registered with the government? On what issues/activities do you interact? How? What government services do you utilise? Give examples.</p> <p>Describe the relationship between your organisation and other local non-government organisations.</p> <p>On what issues/activities do you interact? How? What NGO services do you utilise? Give examples.</p>

## transformational development indicators

10. Resource mobilisation	<p>a) Degree of dependence on WV (or other external agency) for resources:</p> <ul style="list-style-type: none"><li>- <i>Diversity of sources for organisation's resources (e.g., government, other agencies).</i></li><li>- <i>Mobilisation of community resources.</i></li><li>- <i>Resource planning and management by the organisation.</i></li><li>- <i>Ability to undertake initiatives without WV resources.</i></li></ul>	<p>What financial and material resources does your organisation have for its activities and day to day management?</p> <p>Where are these resources from? How did you mobilise/access them? Give examples.</p> <p>What proportion of resources is from the WV development programme?</p> <p>What resources have you mobilised from the community and/or other organisations? Give examples.</p>
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## transformational development indicators

### Social Sustainability Scorecard

Theme	Topic	<i>None = 0</i>	<i>Low = 1</i>	<i>Medium = 2</i>	<i>High = 3</i>
Character and Composition of Community Organisations	Representation and involvement of community members	Most community people are not represented or involved in the organisation. A number of social, ethnic, economic, and age groups are excluded. Perception that the organisation primarily represents a particular elite group and does not care for others.	Community people are generally represented and involved in the organisation. Different social, economic, ethnic, and age groups are represented among the membership, but not as office-bearers or in the leadership. Perception that the organisation cares for some groups less than others.	Most community people are well represented and involved in the organisation. Most social, economic, ethnic, and age groups are represented among the membership and some as office-bearers and in leadership. Perception that the organisation cares for all groups in the community.	Most community people are well represented and actively involved in the organisation. All social, economic, and ethnic groups are represented in leadership and as office bearers as well as membership. Perception that they work together well, and the organisation is focussed on the poorest and marginalised.
	Leadership	Leaders are disconnected from members. A large socio-economic gap between them is the norm. Leaders are not accountable to members. No clear, regular, or democratic processes for selection or replacement of leaders. Leaders may use organisations for personal ends.	Leaders' relationship to members is that of patrons. Socio-economic gap between them is normal. Little accountability of leadership to members. Some established process for selection of leaders, but not democratic or regular. May have no leadership changes for long periods of time.	Leaders have good relationships with members. Little socio-economic gap between them. Leaders are accountable to members. Clearly established process for selection and replacement of leaders.	Leaders have close and trusting relationship with members. No socio-economic gap between them. Leadership is collective and highly accountable to the members. Clear, regular, and democratic process for selection and replacement of leaders which is well understood by members.
	Decision-making	Leaders make all decisions with no involvement of members, who may perceive these as exploitative. There are no clear budgets, plans, etc.	Leaders make decisions with only little involvement of members, but these are usually perceived as fair. Plans and budget seem to be based on leaders' priorities, although they may be developed by an assigned person.	Leaders and members both participate in decision-making, including development of plans and budgets. Members give input that leaders take into account when making these decisions.	Leaders and members actively participate together in decision-making, including development of plans and budgets. The primary role of the leadership is facilitative.
	Gender profile and roles	There are no women in the leadership or among the office-bearers of the organisations. Some women may attend meetings, but their opinions are not voiced or listened to.	There are no women leaders, but there are a few office-bearers who are women. Women members may be active but they do not have a role in decision-making processes. Women are relegated to roles that are considered less important (example: secretary).	Women are represented but are a minority among the leaders and office-bearers of organisations. Women members are active and do participate in decision-making processes to some extent.	There is gender balance in the leadership and the membership. Women always take active roles in decision-making processes.

## transformational development indicators

Theme	Topic	<i>None = 0</i>	<i>Low = 1</i>	<i>Medium = 2</i>	<i>High = 3</i>
	Organisational vision and purpose	Neither the leadership nor the members are aware of any clear organisational purpose or objectives. There seems to be a lack of vision for the future.	Organisational purpose and objectives exist, but only the leadership was involved and is aware of these. Organisational objectives are focused only on the physical needs of people. There is some vision for the future, but it is limited to short term, tangible activities.	Organisational purpose and objectives are clear; both members and leaders were involved and are aware of these. These are focused on the physical and some transformational (relationships, attitudes, values) aspects of development, including the well being of children. The organisation has long term vision.	Organisational purpose and objectives are clear and were developed in a participatory manner. Objectives are transformational and holistic - consistent with a biblical vision for development, including the well being and rights of children. Leadership and the members are committed to a clear organisational vision & mission.
Functioning of Community Organisations	Management of the organisation	Roles and responsibilities in the organisation are not clear. There are no agreed processes for selecting office-bearers. There are no (or very few) financial procedures and records do not exist or are very poorly maintained.	There is some delineation of roles and responsibilities in the organisation. Leaders appoint office-bearers, who are aware of their area of responsibility, but this is not clearly spelled out. Financial procedures and records exist but are not well observed or maintained.	Roles and responsibilities in the organisation are clear. There are procedures for selecting and changing office bearers, who are aware of their specific responsibilities. Basic financial procedures and records are observed and maintained.	Roles and responsibilities in the organisation are clear and well developed. Job descriptions exist for office-bearers, who are selected through clear and transparent procedures. Financial procedures and records are well developed, observed and maintained with good checks and balances in place.
	Organisational meetings	Organisational meetings are not regularly held. Attendance at meetings is poor, and participation very limited. Meetings are used to inform members of decisions already made. There are no minutes, no follow up or planning of meetings.	Meetings are usually held on a regular basis. A significant proportion of members attend meetings, but only a few participate. Purpose of the meeting is normally to communicate information to members and sometimes to seek input, so that the leaders could make decisions. Minutes are not normally taken. Follow up and planning of meetings is poor.	Meetings are always held on a regular basis. Agenda is usually prepared ahead of time by the leaders. Most members attend and participate in the meetings. Meetings involve both information sharing and discussion of issues to influence decision making. Minutes are kept.	Meetings are always held on a regular basis. Agenda is prepared ahead of time by the leaders, with input from members. Most members attend and participate actively. Leaders facilitate discussions so that joint decisions can be made together. Minutes are kept and are available to members. Decisions and agreed actions are followed up.
	Relationship between WV programme and the organisation	High dependency on programme for organisational management and projects. Programme staff participate and provide leadership in all meetings and initiatives.	Low dependency on programme for organisational management, but high dependency for projects. Programme staff participate in meetings, but do not lead them. No initiatives have been taken without WV support.	Autonomy for organisational management and most projects. Programme staff participate in important meetings. Some initiatives have been taken without WV support.	High autonomy for organisational management and projects, and involvement in wider issues. Programme staff are consulted for input and advice as decided by the organisation. Several initiatives have been taken without WV support.



## transformational development indicators

Theme	Topic	<i>None = 0</i>	<i>Low = 1</i>	<i>Medium = 2</i>	<i>High = 3</i>
Networking and Resource Mobilisation	External linkages	Very limited and weak relationships with local government and non-government agencies. The organisation is not recognised by, or registered with, the government. Leaders do not approach government and other agencies.	Informal, irregular relationships and networks with local government and non-government agencies. The organisation is not legally registered, but may be recognised by the local government. Occasionally government and non-government agencies are approached for specific services.	Regular relationships and networks with local government and/or non-government agencies. Organisation may be in the process of legal registration with the government. Several examples of interaction with other agencies (GOs, NGOs, private sector, etc.) and utilisation of their services.	Formal, regular relationships and networks with local government and non-government agencies. Organisation is legally registered and may have agreements with other agencies. They have actively approached local government and/or mobilised members for collective action on specific issues. May network with other agencies on local /national policy issues and/or have members elected in local government bodies.
	Resource mobilisation	Total dependence on WV (or other external agency) for resources. All resources come from one external source. No resources mobilised from community or other agencies.	High degree of dependence on WV for resources. Have mobilised some community resources for a few programmes.	Some dependence on WV. Consistently mobilised community and internal resources for most programmes. Have accessed some resources from government or other agencies (or are in process of doing so). Have undertaken a few initiatives without the support of WV resources.	Organisations have diverse and sound resource base, with long-term plans for resource mobilisation and management. Besides mobilising community and other internal resources, they regularly tap resources from other agencies. They operate their own community development funds and have undertaken several initiatives without the support of WV resources.

### A Guide for Preparing Terms of Reference for Consultant

This transformational development indicator on social sustainability requires one consultant external to the development programme to collect information through document review and focus group discussions. The consultant will analyse the information and assign scores based on a scorecard. This document gives information on selection, preparation, and management of the consultant for the purpose of taking measurements following the stated procedures.

#### Selection

1. The programme will need to select one consultant who is external to the programme being measured. However, this person can be internal to the World Vision National Office. This person should not be a part of line management (for example, Operations Director). It can be someone from the National Office with monitoring and evaluation functions. It can also be a manager of another programme. If this is not possible, this person can be external to World Vision.
2. Care should be taken to ensure that this external consultant understands the local context, is fluent in the local language, is familiar with the transformational development approach of World Vision, and has previous experience in evaluations of development projects. This person also should be familiar with the understanding and practices related to social sustainability.
3. It will be important for this person to have previous experience with community-based organisations in the country.

#### Preparation

1. The consultant should be familiarised with the transformational development approach of WV.
2. The consultant should visit the programme for one or two days to understand the context.
3. The consultant should be familiarised with WV's transformational development indicators, in particular the indicator on social sustainability.

#### Process

1. The documents relating to this transformational development indicator should be translated into the local language, if the consultant is not fluent in English, Spanish, or French. Please refer to Volume 1 on translating materials, if there is need for translation.
2. All relevant programme documents should be made available to the consultant for the purpose of document review.
3. The programme should help plan and facilitate focus group discussions with four community organisations and the programme-wide committee/CBO, if one exists.
4. Permission must be sought from the community organisations to study and learn from their documents. If they agree, documents pertaining to community organisations (see the document checklist later in this chapter) should be gathered and made available to the consultant after the focus group discussions.
5. The consultant will note and analyse the outcomes of the document reviews and focus groups according to the procedures and formats in this chapter and assign scores.
6. The consultant will provide debriefing to the programme manager and the programme-wide committee/CBO to share and validate analysis and scoring. The consultant will provide the notes for any future reference, planning, etc.

## **transformational development indicators**

7. The completed TDI summary report formats will be submitted to the focus group coordinator for TDI measurement in this programme and the programme manager, then on to national, regional, and partnership TDI coordinators.

### **Outputs**

1. The exercise is conducted, and the report submitted to programme, national, regional, and partnership TDI coordinators as per the instructions in the module.
2. Notes of the review and analysis are made available to the programme team.

### **Recommended Support to the Consultant**

1. It is recommended that careful consideration be given to selecting an external consultant to ensure he/she will not charge high amounts for consulting fees to participate in the exercise. Any consulting fee should be appropriate to the country context.
2. The consultant's actual costs while involved in the exercise will need to be covered by the programme. This includes transportation, food, accommodations, and any other incidental costs.
3. The programme should provide the consultant with facilities required for conducting the exercise: office facilities, programme documentation, transportation to the area, etc.

## transformational development indicators

### Document Review Checklists

Complete these checklists indicating which documents were reviewed.

Programme Document Review (Step 9)										
Type of Document	Documents Available <i>mark X below</i>					Documents Reviewed <i>mark X below</i>				
National Office strategies on CBO partnership/capacity building, etc.										
Programme design document										
Programme annual plans										
Programme reports										
Programme evaluation reports										
Other documents relating to community organisation partners, e.g., partnership agreements, contracts, training curriculum/materials, proposals for CBOs (please specify)										
Any other documents (please specify)										
Any comments (e.g., on availability, process of document review)										

  

Community Organisation Document Review (Step 16)										
Type of Document	Documents Available					Documents Reviewed				
	CBO 1	CBO 2	CBO 3	CBO 4	CBO 5*	CBO 1	CBO 2	CBO 3	CBO 4	CBO 5*
Official registration documents										
Organisational chart										
Descriptions of roles and responsibilities										
Plans/proposals										
Budgets										
Financial statements/records										
Reports										
Meeting minutes										
Notebooks										
Any other documents (please specify)										
Any comments (e.g., on availability, process of document review, etc.)										

\* CBO5 = Programme-wide CBO partner (CBOs 1-4 are community level organisations)

## CBO Classification Guide

For reference in completing the CBO classification sheet

<b>COUNTRY CONTEXT</b>	<b>Restricted</b>	<b>Unstable</b>	<b>Emerging</b>	<b>Mature</b>
	Military or single party state Gov't dominated public institutions No local NGOs No genuine CBOs	Violent conflicts Weak government structures Political unrest Economic upheaval Disrupted NGO and CBO environment	New/partial democracy Post conflict society Young/fragile public institutions Emerging civil society NGOs present – but low capacity/maturity Some CBOs	Stable democratic government Relative peace and economic stability Functioning public institutions Strong civil society Active NGO sector Many/diverse CBOs
<b>TYPE OF COMMUNITY PARTNERS</b>	<b>Restricted</b>	<b>Limited</b>	<b>Emerging</b>	<b>Mature</b>
	Local government administration Gov't ministries and service institutions Gov't organised mass organisations/NGOs	Local government Military/political factions Informal/temporary community groups Local churches	New/developing community groups/CBOs Gov't rural/urban development structures Local government Gov't ministries Young local NGOs Local church groups	Established CBOs Local NGOs Local gov't development structures Private sector groups NGO coalitions/federations Church based commissions/NGOs
<b>LEVEL OF COMMUNITY PARTNERS</b>	<b>Sub-Village (sub-urban neighbourhood)</b>	<b>Village (or urban neighbourhood)</b>	<b>Programme-wide</b>	<b>Regional or National</b>
	Examples: Small groups Self-help groups Solidarity groups Neighbours' group  Several per village	Examples: Village association Village development committee Urban neighbourhood development group  One per village Several per programme	Examples: Programme committee District dev't committee Local NGO of village associations/CBOs Urban neighbourhood development group  One per programme	Examples: Federation of village associations/CBOs Coalition /network of local NGOs National NGO  One from several programmes One per region/country

## transformational development indicators

FUNCTION OF COMMUNITY PARTNERS	General Community Development	Specialised Function
	<p>Integrated community development purpose and activities May have specialised sub-committees or persons assigned specialist functions</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>▪ Village Development Association</li> <li>▪ Programme committee</li> </ul> <p><i>One at each level (village, programme, etc.)</i></p>	<p>Purpose related to specific social/development sector or activity May have links to general community development organisation</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>▪ Water/irrigation users' group</li> <li>▪ Health volunteers or TBA group</li> <li>▪ Parent-Teachers Association</li> <li>▪ Literacy committee</li> <li>▪ Savings and credit group</li> <li>▪ Market traders association</li> <li>▪ Church/mosque/temple committee</li> <li>▪ Cultural/theatre/sports/music groups</li> </ul> <p><i>May have several at each level (village, programme, etc.)</i></p>

MEMBERSHIP OF COMMUNITY PARTNERS	General – representative of community	Specialised – by people group
	<p>Members drawn from across all sections of the community/programme Ideally includes both men and women, and is inclusive of other aspects of diversity in the community/programme (e.g., age, ethnicity, religion, [dis]ability, social status)</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>▪ Village Development Association</li> <li>▪ Programme committee</li> </ul> <p><i>One at each level (village, programme, etc.)</i></p>	<p>Membership determined by specific criteria related to a particular category or grouping of people May include organisations initiated by members of those people groups (e.g., self-help groups), or may be initiated by a CBO, NGO, or the programme, and have links with these</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>▪ Women's group</li> <li>▪ Children's association</li> <li>▪ Elderly group</li> <li>▪ People living with HIV/AIDS group</li> <li>▪ Youth group</li> <li>▪ Disabled persons group</li> </ul> <p><i>May have several at each level (village, programme, etc.)</i></p>

ORIGIN OF COMMUNITY PARTNERS	Community Initiated	Externally (not WV) Initiated	WV Initiated
	<p>Organisation started from within the community, by community members</p> <ul style="list-style-type: none"> <li>▪ Community initiated organisations may include traditional bodies with cultural and/or religious origins (e.g., village elders, church/mosque/temple committee).</li> <li>▪ They may be groups that have emerged in response to a particular community need and/or initiative (e.g., locally set up cooperative)</li> </ul>	<p>Organisation started due to the initiative, influence, or support of others, e.g.,</p> <ul style="list-style-type: none"> <li>▪ Government mandated (e.g., in line with rural development structures or government led mass organisations)</li> <li>▪ Linked to regional/national movements or associations (e.g., union, association of traders, disabled persons association)</li> <li>▪ Initiated by other NGO</li> </ul>	<p>Organisation started due to the initiative, influence or support of World Vision development programme/ADP</p>

## transformational development indicators

COVERAGE OF COMMUNITY PARTNERS	A = Total number of communities in programme/ADP area	B = Number of communities with functioning community partner organisation	C = Coverage $A/B \times 100 = C \%$
Example numbers entered here → as a reference in completing the form	<p>74 villages</p> <p><i>Define communities by local administrative area or other definition used by programme/ADP, e.g., village, ward, neighbourhood</i></p>	<p>38 villages with village development association</p> <p><i>Number of functioning community partner organisations at the time of TDI measurement</i></p>	<p><math>38/74 \times 100 = 51\%</math></p> <p><i>Proportion of programme communities with functioning community partner present</i></p>

## transformational development indicators

### CBO Classification Sheet

Step 7		Complete CBO classification sheet for inclusion in TDI report ➤ Refer to CBO classification guide for explanation and examples			
<b>COUNTRY CONTEXT</b>	Restricted	Unstable	Emerging	Mature	
Put <b>X</b> here →					
Comment: →					
<b>TYPE OF COMMUNITY PARTNERS</b>	Restricted	Limited	Emerging	Mature	
Put <b>X</b> here →					
Name/s of partners and comments →					
<b>LEVEL OF COMMUNITY PARTNERS</b>	Sub-Village (sub-urban neighbourhood)	Village (or urban neighbourhood)	Programme-wide	Regional or National	
Put <b>X</b> here → at each level where CBO partner exists					
Comment: →					
<b>FUNCTION OF COMMUNITY PARTNERS</b>	General Community Development		Specialised Function		
Put <b>X</b> here →					
Comment: → List if more than one partner					



## transformational development indicators

<b>MEMBERSHIP OF COMMUNITY PARTNERS</b> Put <b>X</b> here →	General – representative of community	Specialised – by people group	
Comment: → List if more than one partner			

  

<b>ORIGIN OF COMMUNITY PARTNERS</b> Put <b>X</b> here →	Community Initiated	Externally (not WV) Initiated	WV initiated
Comment: →			

  

<b>COVERAGE OF COMMUNITY PARTNERS</b>	A = Total number of communities in programme/ADP area	B = Number of communities with functioning community partner organisation	C = Coverage $A/B \times 100 = C \%$
Enter actual numbers here →			
Comments: →			

Focus Group Log Sheet

TDI Focus Group Log Sheet		Consultant complete Log Sheet at Steps 15 and Step 21	
TDI: Social Sustainability		Log sheet completed by _____ (name) on _____ (date)	
<b>Community Organisation (CBO) and Participant Information</b>			
<i>Refer to CBO classification guide and examples given to complete level, type, function, membership, and origin of CBO fields</i>			
Location:			
Name of CBO:		Level of CBO (village/neighbourhood or programme/ADP wide):	
Type of CBO:		Function of CBO (if not general CD replace with their specific function):	General Community Development
Membership of CBO:		Origin of CBO (community, external, or WV initiated):	
Selection of CBO for FG (state criteria, category, and/or any comments explaining how & why this CBO was selected):			
Number of FG participants:		Gender of FG participants (number of male & female):	
Participants role in CBO (state whether office bearers & their designation, or members):			
<b>Focus Group Facilitation Information</b>			
Date of focus group:		Facilitator (name + gender):	
Recorder (name + gender):		Observer (name + gender):	
Consultant (name + gender):		Type of consultant (state whether WV staff or external):	
Recording method	<input type="checkbox"/> note taking <input type="checkbox"/> tape recording <input type="checkbox"/> note taking & tape record		
Any comments on FG facilitation:			
<b>Focus Group Analysis, Scoring, and Reporting Information</b>			
Scores assigned for:			
<u>Topic 1</u>	<u>Topic 2</u>	<u>Topic 3</u>	<u>Topic 4</u>
<u>Topic 5</u>	<u>Topic 6</u>	<u>Topic 7</u>	<u>Topic 8</u>
<u>Topic 9</u>	<u>Topic 10</u>	<u>Total Scores</u>	
Date of scoring by consultant:		Date of validation meeting:	Validation meeting participants (names):
Log sheet & analysis worksheets submitted to (name):		Any comments on analysis & scoring process:	

Analysis Worksheets – for Focus Groups and Document Review

Sample Analysis Worksheet (for Topic 1)

Topic 1: Representation and involvement of community members

<i>Key Concepts Explored</i>	
a)	Extent to which the community organisation represents the diversity of people in the community, e.g., <ul style="list-style-type: none"><li>– <i>Level of involvement of community people as members</i></li><li>– <i>Inclusion (or exclusion) of certain social, economic, ethnic, or age groups</i></li><li>– <i>Focused on elite or cares for all including the poorest/marginalised</i></li></ul>

**Step 9** Conduct programme document review

**Key points relevant to this topic learned through document review** (general comments on CBOs in the programme, not specifically in relation to this CBO):

**Step 16** Conduct community organisation document review

**Key points relevant to this topic learned through document review** (for this specific CBO):

## Sample Analysis Worksheet (for Topic 1)

Topic 1: Representation and involvement of community members

**Step 17** Review focus group contents/data for topic 1, with analysis worksheet as a guide  
Record key points and notable quotes in analysis worksheet

Key Concepts Explored	
<p>a) Extent to which the community organisation represents the diversity of people in the community, e.g.,</p> <ul style="list-style-type: none"> <li>– Level of involvement of community people as members</li> <li>– Inclusion (or exclusion) of certain social, economic, ethnic, or age groups</li> <li>– Focused on elite or cares for all including the poorest/marginalised</li> </ul>	
Key Points - covering the full range of opinions expressed in the discussion; must represent both the most common comments from participants and any significant differences that emerged	Notable Quotes/Examples - comments which best illustrated the key points, memorable individual comments, any important differences of perspective and opinion that were voiced

**Step 18** Assign score for topic 1, with scorecard and analysis worksheet as guides

Score range			
None = 0	Low = 1	Medium = 2	High = 3
Most community people are not represented or involved in the organisation. A number of social, ethnic, economic, and age groups are excluded. Perception that the organisation primarily represents a particular elite group and does not care for others.	Community people are generally represented and involved in the organisation. Different social, economic, ethnic, and age groups are represented among the membership, but not as office-bearers or in the leadership. Perception that the organisation cares for some groups less than others.	Most community people are well represented and involved in the organisation. Most social, economic, ethnic, and age groups are represented among the membership and some as office-bearers and in leadership. Perception that the organisation cares for all groups in the community.	Most community people are well represented and actively involved in the organisation. All social, economic, and ethnic groups are represented in leadership and as office bearers as well as membership. Perception that they work together well, and the organisation is focussed on the poorest and marginalised.

### Proforma Analysis Worksheet (for Topics 2-10)

**ENTER:** Topic number and topic name

<i>Key Concepts Explored</i>
<i>ENTER THE KEY CONCEPTS EXPLORED FOR THIS TOPIC – FROM THE DISCUSSION GUIDE</i>

#### Step 9 Conduct programme document review

**Key points relevant to this topic learned through document review** (general comments on CBOs in the programme, not specifically in relation to this CBO):

#### Step 16 Conduct community organisation document review

**Key points relevant to this topic learned through document review** (for this specific CBO):

## Proforma Analysis Worksheet (for Topics 2-10)

<p><b>Step 19</b></p> <p>(a)</p>	<p><b>Review focus group contents/data and assign scores for topics 2-10, with analysis worksheets as guides. <i>Record key points and notable quotes in analysis worksheet.</i></b></p>
----------------------------------	--

**ENTER:** Topic number and topic name

Key Concepts Explored	
<p><b>ENTER THE KEY CONCEPTS EXPLORED FOR THIS TOPIC – FROM THE DISCUSSION GUIDE</b></p>	

<b>Key Points</b> - covering the full range of opinions expressed in the discussion; must represent both the most common comments from participants and any significant differences that emerged	<b>Notable Quotes/Examples</b> - comments which best illustrated the key points, memorable individual comments, any important differences of perspective and opinion that were voiced

<b>Step 19(b)</b>	Review focus group contents/data and assign scores for topics 2-10, with analysis worksheets as guides. <i>Circle the assigned score: 0 (none), 1 (low), 2 (medium), or 3 (high).</i>
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Score Range			
None = 0	Low = 1	Medium = 2	High = 3
<i>ENTER THE</i>	<i>SCORE CARD</i>	<i>PORTION FOR</i>	<i>THIS TOPIC</i>

## transformational development indicators

### Summary Final Report, Social Sustainability (Tables R1, R2, R3, & R4)

The results reported here should represent all focus groups and document reviews. Focus groups and document reviews were to be conducted with four different community based organisations, and, if it exists, the programme-wide CBO partner. Thus, there will be at least four focus groups and document reviews, and in some cases, five.

Please complete the four tables below following the instructions in Steps 23-25 of this chapter, and submit this report together with the CBO classification sheet. For examples of TDI reports, please see Volume 8 of this field guide.

<b>Table R1: General Programme information</b>			
<b>Country:</b>		<b>Programme Name:</b>	
<b>Year Programme Started:</b>		<b>Programme Number:</b>	
<b>Previous year(s) of TDI measurement:</b>			

TDI Focus Group Summary Information Sheet <b>Table R2:</b> Complete at Step 25 with log sheets from all 5 FGs <b>Social Sustainability</b> Submitted as part of TDI report by _____ (name) to _____ (name) on _____ (date)					
	CBO 1	CBO 2	CBO 3	CBO 4	CBO 5*
<b>Community Organisation (CBO) and Participant Information</b> <i>Refer to FG log sheets, CBO classification guide, and examples given to complete level, type, function, membership, and origin of CBO fields</i>					
Location:					
Name of CBO:					
Level of CBO:					Programme-wide
Type of CBO:					
Function of CBO:	General Comm.Dev	General Comm.Dev	General Comm.Dev	General Comm.Dev	General Comm.Dev
Membership of CBO:					
Origin of CBO:					
Selection of CBOs (explanation of CBO selection for FGs):					
Number of FG participants:					
Gender of FG participants:					
Participant role in CBO (no. of members, no. of office bearers):					
<b>Focus Group Facilitation Information</b>					
Date of focus group:					
Gender of facilitator:					

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Recording method (note taking +/- tape recording):					
Focus Group Analysis, Scoring, and Reporting Information					
Date of scoring by consultant:					
Date of validation mtg.:					
Number of validation meeting participants:					
Number of quotes in TDI summary report:					
Explanatory comments and learning from the process (successes, problems, suggestions on process) Comments on:					
CBO selection:					
Document review:					
FG facilitation and recording:					
Analysis, scoring, validating, and reporting from FGs:					
Other:					



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*TDI Focus Group Summary Score Sheet* **Table R3:** Complete summary sheet at Step 25 with log sheets from all 5 FGs

*Social Sustainability* Submitted as part of TDI report by \_\_\_\_\_ (name) to \_\_\_\_\_ (name) on \_\_\_\_\_ (date)

Topic	CBO 1	CBO 2	CBO 3	CBO 4	CBO 5 *	Total
1. Representation of community members						
2. Leadership						
3. Decision making						
4. Gender profile and roles						
5. Organisational vision and purpose						
6. Organisational management						
7. Meetings						
8. Relationship between organisation & programme/WV						
9. External linkages						
10. Resource mobilisation						
<b>Total</b>						

\* CBO 5 = Programme-wide CBO partner (CBOs 1-4 are community level organisations)

TDI Focus Group Summary – Narrative Report: Selected Sample Key Points, Quotes, and Examples					
Social Sustainability		<b>Table R4:</b> from 5 focus group discussions (CBO1, 2, 3, 4 & 5): Complete at Steps 24-25			
<b>Below:</b> shade boxes showing scores of CBO1, CBO2, CBO3, CBO4, CBO5 (CBO 5 = programme-wide)		<b>Below:</b> write one key point (1-2 sentences) and 1-3 quotes from focus groups for each topic. These are to be selected following the guidelines in Step 24 of this chapter. In brackets, note in bold the focus group source of each point or quote – from CBO 1, 2, 3, 4, or 5 (e.g., <b>CBO1</b> or <b>CBO3</b> ); note in italics the type of comment – Representative, Divergent, or high Interest (R or D or I)			
No. of Groups					<b>Topic 1: Representation and involvement of community members</b> Key Point:  Notable Quote/Example:
	0	1	2	3	
		Scores Given			
No. of Groups					<b>Topic 2: Leadership</b> Key Point:  Notable Quote/Example:
	0	1	2	3	
		Scores Given			
No. of Groups					<b>Topic 3: Decision making</b> Key Point:  Notable Quote/Example:
	0	1	2	3	
		Scores Given			
No. of Groups					<b>Topic 4: Gender profile and roles</b> Key Point:  Notable Quote/Example:
	0	1	2	3	
		Scores Given			
No. of Groups					<b>Topic 5: Organisational vision and purpose</b> Key Point:  Notable Quote/Example:
	0	1	2	3	
		Scores Given			

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No. of Groups					<b><u>Topic 6: Management of the organisation</u></b> <i>Key Point:</i>  <i>Notable Quote/Example:</i>
	0	1	2	3	
	Scores Given				

No. of Groups					<b><u>Topic 7: Organisational meetings</u></b> <i>Key Point:</i>  <i>Notable Quote/Example:</i>
	0	1	2	3	
	Scores Given				

No. of Groups					<b><u>Topic 8: Relationship between programme/ADP and the organisation</u></b> <i>Key Point:</i>  <i>Notable Quote/Example:</i>
	0	1	2	3	
	Scores Given				

No. of Groups					<b><u>Topic 9: External linkages</u></b> <i>Key Point:</i>  <i>Notable Quote/Example:</i>
	0	1	2	3	
	Scores Given				

No. of Groups					<b><u>Topic 10: Resource mobilisation</u></b> <i>Key Point:</i>  <i>Notable Quote/Example:</i>
	0	1	2	3	
	Scores Given				

## transformational development indicators

### Chapter 3. References

#### TD Indicators

Title	Indicator	Definition	Data Source	Measurement process
<b>Water.</b>	Percent of households who have year round <i>access to an improved</i> water source.	<i>Access to an improved</i> water source means 15 or more litres of water per person per day, from a potable source within 30 minutes of the household. Potable source means a tap, protected well, or other protected water source.	Primary data from household survey.	Primary data: 30 cluster random household survey, verified by principal caregiver report.
<b>Nutrition.</b>	Percent of boys and percent of girls, aged 6 – 59 months, <i>stunted</i> .	<i>Stunted</i> means the child has a Z–score below minus 2 standard deviations (SD) from the median height-for-age of the CDC/WHO standard. (This indicates moderate &/or severe malnutrition.)	Primary data from household survey.	Primary data: 30 cluster random household survey, verified by age, height, and weight measurements.
<b>Primary Education.</b>	Percent of boys and percent of girls who are <i>enrolled</i> in or have <i>completed</i> the first six years of formal education.	<i>Enrolled</i> means currently enrolled in the appropriate year of formal education for the child’s age. <i>Completed</i> means successfully passed the sixth year of formal education while of the recommended age for that level. Appropriate level and age are determined by the country’s Ministry or Department of Education. These first years of formal school are often identified as primary or elementary school.	Primary data from household survey.	Primary data: 30 cluster random household survey, verified by principal caregiver report.

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<b>Diarrhoea Management.</b>	Percent of children 0 – 59 months with <i>diarrhoea</i> in the past two weeks, whose disease was <i>acceptably managed</i> .	<i>Diarrhoea</i> means more than 3 loose stools passed in a 24 hour period. <i>Acceptably managed</i> means the child received increased fluids (preferably ORT or recommended home fluid) during the disease and while recovering.	Primary data from household survey.	Primary data: 30 cluster random household survey, verified by principal caregiver report.
<b>Immunisation.</b>	Percent of children aged 12 – 23 months <i>fully immunised</i> .	<i>Fully immunised</i> means the child has received all National Ministry of Health (MOH) recommended vaccines before 12 months. Must include immunisation against diphtheria, pertussis, tetanus, measles, poliomyelitis, and tuberculosis.	Primary data from household survey.	Primary data: 30 cluster random household survey, immunisation status verified by MOH individual vaccination cards.
<b>Household Resilience.</b>	Percent of households adopting <i>coping strategies</i> within the past year.	<i>Coping strategies</i> means an adaptive coping strategy, sale of a liquid or productive asset, so as to mitigate the impact of external shocks and /or environmental stress factors in order to provide the household's basic necessities.	Primary data from focus group discussions & household survey.	Primary data: Focus group discussions to identify local coping strategies, specific to the communities, to be used in a survey. 30 cluster random household survey, verified by principal caregiver report.
<b>Poorest Households.</b>	Percent of <i>poorest households</i> .	<i>Poorest households</i> means those households identified to be the most socially and/or economically disadvantaged within a community.	Primary data from wealth ranking exercises.	Primary data: Series of wealth ranking exercises involving community leaders and community members from sample communities.
<b>Caring for Others.</b>	Community members <i>care for each other</i> .	<i>Care for each other</i> means that men, women, boys, and girls perceive that they care for others and others care for them in their community. <i>Care for each other</i> is defined around dimensions regarding use of community resources, gender relations, valuing and protection of children, well-being of vulnerable persons, and conflict prevention/resolution.	Primary data from focus group discussions.	Primary data: Guided focus group discussions with men, women, boys, and girls. Information analysed and indexed by a rating committee using specific rating guidelines.

## transformational development indicators

<b>Emergence of Hope.</b>	Communities' <i>emergence of hope</i> in their future.	<i>Emergence of hope</i> means that men, women, boys, and girls perceive and demonstrate hope in their future. Dimensions of this <i>emergence of hope</i> include peoples' perceptions of the past and the present, attitude towards the future, self-esteem, and spirituality.	Primary data from focus group discussions.	Primary data: Guided focus group discussions with men, women, boys, and girls. Information analysed and indexed by a rating committee using specific rating guidelines.
<b>Christian Impact.</b>	<i>Christian capacity &amp; intentionality</i> of programme teams.	<i>Christian capacity and intentionality</i> means active staff spiritual nurture, strong church relations, and appropriate witness to Christ.	Secondary data from document review.  Primary data from focus group discussions.	Secondary data: Review of programme documents. Primary data: Guided focus group discussion with Christian programme staff. Information analysed and indexed by two consultants using specific rating guidelines.
<b>Community Participation.</b>	<i>Community participation</i> in development.	<i>Community participation</i> means that men, women, boys, and girls perceive they actively participate in all aspects of their development, with particular focus on programme planning, implementation, monitoring, and evaluation.	Primary data from focus group discussions.	Primary data: Guided focus group discussions with men, women, boys, and girls. Information analysed and indexed by a rating committee using specific rating guidelines.
<b>Social Sustainability.</b>	<i>Social sustainability</i> of community development.	<i>Social sustainability</i> is defined as the capacity within local community organisations to sustain the long term viability and impact of development processes. This capacity is focused on how conditions for social sustainability are created through the character, functioning, resource mobilisation, and networking skills of community organisations.	Secondary data from document review.  Primary data from focus group discussions.	Secondary data: Review of documents from development programmes and community organisations. Primary data: Guided focus group discussions with office bearers and members of community organisations. Information analysed and indexed by a consultant using specific rating guidelines.

## Steps in Measurement, Analysis, & Reporting of Community Participation

### Planning and Preparation

Step 1	Selection of focus group data collectors
Step 2	Translation of relevant TDI documents
Step 3	TDI orientation for focus group data collectors
Step 4	Focus group training and practice
Step 5	Selection of communities for focus groups
Step 6	Selection of focus group participants in each community

### The Focus Group

Step 7	Introduce the focus group – it's purpose and the people involved
Step 8	Facilitate discussion of the indicator by focus group participants, using the discussion guide
Step 9	Review the process

### Analysis and Scoring

Step 10	Discuss focus group contents/data for topic 1, with analysis worksheet as a guide
Step 11	Assign score for topic 1, with scorecard and analysis worksheet as guides
Step 12	Discuss focus group contents/data and assign scores for topics 2-8 with analysis worksheets as guides
Step 13	Complete focus group records
Step 14	Archive focus group notes/recordings

### Reporting

Step 15	Gather completed log sheets & analysis worksheets from all FGs for the indicator
Step 16	Hold meeting of data collection teams for information sharing and consolidation
Step 17	Selection of key points and quotes from focus groups for the indicator
Step 18	Complete report Tables R1, R2, R3, and R4 and submit report for the indicator

## Steps in Measurement, Analysis, & Reporting of Social Sustainability

### Preparation

Step 1	Selection of consultant
Step 2	Selection of focus group data collectors
Step 3	Translation of relevant TDI documents
Step 4	Orientation of consultant and focus group data collectors
Step 5	Focus group training and practice

### Programme Level Document Review and Interview

Step 6	Programme staff interview
Step 7	Complete CBO classification sheet
Step 8	Identify and gather programme documents for review
Step 9	Conduct programme document review

### Community Organisation Focus Group Discussions & Document Review

Step 10	Selection of community organisations for focus groups
Step 11	Selection of participants for focus groups from office bearers and members of CBO

### The Focus Group Discussions

Step 12	Introduce the focus group – its purpose and the people involved
Step 13	Facilitate discussion of the indicator by focus group participants, using the discussion guide
Step 14	Identify and gather community organisation documents for review
Step 15	Review the process
Step 16	Conduct community organisation document review

### Analysis and Scoring

Step 17	Review focus group contents/data for topic 1, with analysis worksheet as a guide
Step 18	Assign score for topic 1, with scorecard and analysis worksheet as guides
Step 19	Review focus group contents/data and assign scores for topics 2-10, with analysis worksheets as guides
Step 20	Validation
Step 21	Complete focus group records
Step 22	Archive focus group notes/recordings
Step 23	Gather all completed FG records (log, classification, document review, analysis worksheets)
Step 24	Selection of key points and quotes from focus groups for the indicator
Step 25	Complete report Tables R1, R2, R3, and R4, and submit report for the indicator



## Acronyms

ADP	Area Development Programme
CBO	Community Based Organisation
DeRT	Development Resources Team
FG	Focus Group
GO	Government organisation
MSAN	Ministry Standards Advisory Network
MSWG	Ministry Standards Working Group
MSTC	Ministry Standards Testing Centre
NGO	Non-government organisation
PLA	Participatory Learning and Action
PRA	Participatory Rural Appraisal
TD	Transformational Development
TDI	Transformational Development Indicators
WV	World Vision

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